

## HOW TO ADD A PROSPECT - APPLE

Adding a potential customer to sales-i is the perfect way to ensure you track any and all conversations

you're having with them, and set you up for future success when you win their business.

Pease note: This setting can only by updated/edited for contacts manually added onto sales-i, and cannot be changed for contacts imported from your invoicing system.

Top tip: It's a good idea to search for this prospect first to check they don't exist on sales-i already.





Enter all relevant details for the account and tap **Save** (top right hand corner).



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Now you have saved details of your prospect account, you may wish to enter details of any contacts related to this account.

To do so, Select **Contacts** from the accounts Actions tab.

Chicago Chicago Illinois 60606 Telephone 8456778956 Web Address www.davies.com Customer Analysis (0) Insights

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Contacts Call I	History Notes	es Opportunities
Contacts		
	<b>I</b>	<b>\$</b> ,
Enquiries Gene	rate Snapsho	not Campaigns

## 11:08 I AT&T 🗢 Account Details Contacts Davies Inc (P-00000015182)

## **05 OPTIONAL**

Tap the + icon (top right hand corner).

## **06 OPTIONAL**

Next, enter your contact's details.

You can do this manually or if you already have contacts on your iPhone or iPad, you can upload their details by tapping the Upload icon (located next to the Save Icon in the top right hand corner).

Once you have entered all relevant details, tap Save. (Right hand corner).

atl AT&T 🗢	09:06	
✓ Account Details	Add Contact	[↓] Save
Contact Details		
First Name *		
Harry		
Last Name *		
Davies		
Job Title		
VP of Sales		
Office Phone		
8767875966		
Cell Phone		
Cell Phone		
Email Address		
hdavies@davies.con	ı	
Address		

Create new address Customer: 1670 Oak Street, Suite 1200, Chicago, Chicago, Illinois, 60606